

Note-Worthy Productivity Tools for Personal Knowledge Management

By Mary Axford and Crystal Renfro

Since the beginning of the written word, individuals have been struggling with the dual problems of organizing and retrieving information. Librarians led the way as some of the first knowledge managers. Their role continues to expand and change as technology provides the world with new ways to record and exchange information. The barrage of information from all directions makes it a challenge for everybody to assimilate and effectively manage their lives. Luckily, there are many new online tools to help with that process.

Librarians at the Georgia Institute of Technology use notebook programs as one key tool to help them with personal knowledge management on the job and at home. However, some use Microsoft OneNote while others prefer Evernote, from Evernote, Inc. This article traces the evolution of knowledge management and delves into practical ways that notebook products can be used to enhance time management and workplace productivity for librarians. We compare the advantages and disadvantages of Evernote and OneNote so that readers can make informed choices about which product would best fit their personal needs.

INFORMATION OVERLOAD

Information bombards us every day via multiple devices, media types, and locations. It assaults us for a multitude of varied purposes, related to both our work and our personal lives. Long before smartphones, tablets, ebooks, and 4G Networks, experts were talking about the problem of "information overload," a term popularized in the 1970s by Alvin Toffler's *New York Times*' bestselling book *Future Shock*.

With the current economic environment pushing workplaces to trim already lean budgets, improving efficiency and retaining employees who are adept at doing more with less becomes critical to an organization's survival. Employees and employers alike continue to search for ways to ease the impact of information overload coupled with the pressure of tighter deadlines and lean resources.

Libraries are feeling this same pinch, and librarians continually face the challenge of meeting the call of providing superior service with less and less.

Facilitating information retrieval was once the sole bailiwick of librarians in corporate, academic, and public environments, whose careful indexing and documenting of materials provided systematic ways of finding information on demand. With the advent of personal computers and the internet, information exploded, as did the need for personal knowledge management. Librarians, businesses, and the general public found themselves more dependent on the

technical knowledge of computer professionals who knew how to manipulate these new environments.

Computer professionals focus on optimizing resources, improving information flow, and handling mammoth amounts of data, their vision of knowledge management. For decades, their systemized study of how individuals can better handle these issues did not progress past the holy grail of the daily planner, a fat notebook of calendars, to do lists, and other "productivity" charts and techniques. Users were expected to laboriously and faithfully complete these each day to manage their time and organize every aspect of their lives.

PERSONAL KNOWLEDGE MANAGEMENT

It was around the turn of the 21st century that the term "Personal Knowledge Management" first began to be used, as explained by Jason Frand and Carol Hixon in their UCLA Anderson School of Management Working Paper, "Personal Knowledge Management: Who, What, Why, When, Where, How?" (www.anderson.ucla.edu/faculty/jason.frand/researcher/speeches/PKM.htm).

Its growth in popularity was slow, with limited published scholarly research. The advent of Web 2.0 brought a new focus—the idea of users being content generators as well as passive readers. The web exploded once again, this time with new applications and tools designed by users for users. Among these were new tools to help individuals manage the diverse amount and types of data and information they dealt with on a daily basis. Some of the tools were freely available on the web while others were packaged for sale.

This new breed of application development took on varied forms and focused on many different kinds of problems, several related to personal knowledge management. There were applications designed to create computer-based to-do lists, sites dedicated to connecting users with friends and family, and others for storing user-created videos or photographs. Vehicles such as blogs and wikis allowed people to share their ideas and their lives. Forums arrived where people could ask questions and gather ideas about how to solve a myriad of problems.

LIBRARY 2.0

Librarians responded to the Web 2.0 concept by developing a companion concept. Aptly named Library 2.0, it placed renewed emphasis on the traditional library focus of serving our users by introducing increased participation by the user in the development of library features more suited to their needs. These user-centered enhancements included allowing users to add content to the library catalog via the use of tags and encouraging user participation and feedback on new features. Librarians also became much more active in the use of online social media to reach users at their point of need.

The surge of Web 2.0 applications and concepts also significantly affected our daily work lives. Employees who once had to handle the organization of memos,

research papers, books, and project notes now had the added challenge of organizing information gleaned from emails, slide presentations, blogs, wikis, photographs, video, and other multimedia sources of data. Various application developers introduced new tools that, like the paper day planner of old, purported to answer all of a person's organization needs.

Riding along on this wave of information applications, librarians have remained one of the early sources of support for those seeking guidance through this new landscape. In schools, Media Specialists find themselves teaching students new technologies, such as how to create their first blog. They are often the first responders to teachers who want to incorporate new technologies into their classrooms.

Academic librarians have similar roles, assisting professors who want to provide supplemental information sources for their courses and helping students who are trying to traverse the mountains of information that they need to distill into meaningful projects and theses. Public librarians, corporate librarians, and other information professionals have similar requests from their user groups. Librarians themselves become bogged down trying to organize and manage all the many information sources they encounter each day. Everyone, it seems, is searching for the magic answer to conquer information overload. The search for this holy grail continues.

ELECTRONIC NOTEBOOK SOFTWARE

We would love to be able to present that organizational holy grail application that magically organizes a person's life, but the truth is that no single product will meet every organizational need of an individual; one application does not fit all.

That being said, one type of product has made a significant impact on improving our efficiency and organization—the electronic notebook. Consider electronic notebooks as ecosystems for organizing work and personal life. They are applications that allow users to collect a myriad of data in varied formats (web content, text, images, audio, and video) in one place. While perhaps better known to students who frequently use electronic notebooks to take notes for classes, these tools have significant value to library employees as well. The two most popular products are OneNote and Evernote.

There are as many different ways to use electronic notebooks as there are users of the applications. The open design allows users to customize the contents to fit their particular needs. Unlike document and spreadsheet applications, where the structure is predefined by the user, notebook programs allow data to be moved around, reorganized, and sorted very easily.

They are also designed to sync with different devices and different locations, allowing multiple users to edit and update the files. This makes these products excellent for group collaboration at work as well as organizing family life at home.

They offer powerful search engines for finding the right note among many. Additionally, optical character recognition (OCR) lets you scan or photograph handwritten notes and turn them into editable text.

ELECTRONIC NOTEBOOK APPLICATIONS IN THE LIBRARY WORKPLACE

Many of the uses of electronic notebooks apply to anyone's productivity needs. However, we've found several that are of particular value in library settings.

- **Research:** Keep the notebook open at all times to easily clip items in a common place when doing research and scholarly writing.
- **Replacing the old accordion folder method of project organization:** Copies of documents, minutes, spreadsheets, diagrams, photos, videos, and more can be tagged with a common project name for easy retrieval. Separate notebooks or notebook sections can be created.
- **Replacing the paper day planner binder:** Some electronic notebooks offer free templates to recreate different formats of calendars and to do lists. That heavy day planner can instead be accessed on a user's desktop or smartphone.
- **Collection development:** Notebooks are a perfect place to collect those materials under consideration for collection development orders, especially after department funds for the year have been spent and it is necessary to keep track of the items until next year's budget is available.
- **Bin lists:** Our department is constantly collecting ideas for future events for library hosted graduate and faculty talks. Shared Notebooks are a great place to collect interesting news articles, websites, books, snippets from slide presentations, photographs, and other idea-generators.
- **Administrative tasks:** Save receipts for a project or department; create schedules; record phone calls; set meeting agendas; store travel plans and itineraries.
- **Report preparation:** Notebooks are great places to collect all those miscellaneous memos, task lists, statistics, and project timelines from all kinds of different sources and formats that serve as the background data for annual reports.
- **Directory of system problems:** A library's system department can use notebooks to collect system problem tickets. Screenshots can be captured along with notes from technician on resolutions. If problems recur, you can search for the previous solution.
- **Keeping track of Contacts:** Electronic notebooks offer more functionality than the traditional address book. Use the containers/notes to list birthdays,

pictures of the individual, why they are an important contact, personal preferences, family members' names, and information.

- **Ultimate Conference Buddy:** As well as capturing contact information, you can take notes on sessions and capture presentation summaries, websites mentioned, pictures of speakers, and even audio clips. Organize notes from products seen at vendor demos, keep task lists for follow-up. Scan handouts from important sessions and save with the rest of the data about it. Have maps of the area, airline ticket and hotel information, copies of receipts, and reimbursement information stored together.
- **Service Desk Buddy:** Use electronic notebooks at the service desk to keep track of system outages, printers down, locations of events for which people are looking, and hot questions (with their answers!) of the day. Easy to update and consult by staff working different shifts, notebooks are a quick way to keep everyone alerted to all those to-the-minute details.
- **Capturing Meeting notes:** Take a picture of whiteboards filled with notes from working meetings, attach the photo to a notebook page, and then utilize the OCR capabilities of many notebooks to search those notes later.

CHOOSING AN ELECTRONIC NOTEBOOK

OneNote and Evernote are the two market leaders in the electronic notebook arena. They have many features in common, but each offers unique advantages and disadvantages. Here are a few of these distinguishing characteristics to help librarians making a decision regarding which product to adopt:

Advantages of OneNote:

- A hierarchical structure to notes: With notebooks, sections, groups, pages and subpages, there are well over 150,000 organizing areas available.
- Direct synchronization with Outlook's calendar.
- A "print to OneNote" feature from all Office products that allows for a quick transfer of data from Microsoft applications to OneNote with a simple click.
- Hyperlinking between pages and notebooks is supported, as is working in tables.
- MindManager mind maps can be directly exported to OneNote.
- A myriad of helpful templates, including an extensive set of project management tools.
- Audio and Video Indexing: A meeting can be recorded by OneNote while the user also takes notes on the discussion. OneNote can sync the keywords

from the written notes to the corresponding section of the audio recording, which is also stored in the notebook. Also, a search can be done and anywhere the search term is used in an audio or video file, OneNote will take the user to that exact spot so the file can be played.

- When using a tablet PC or LiveScribe pens, OneNote has strong handwriting recognition capabilities.
- The OneNote application automatically comes with all 2010 Microsoft Office packages.

Disadvantages of OneNote:

- OneNote trails Evernote in mobile applications OneNote developers focused first on creating Windows based apps, and more recently released applications for iOS and Android. These apps work in conjunction with Microsoft SkyDrive, but lack key components of the desktop versions such as the ability to create new notebooks or to apply special formats to text.
- There is another iOS and Android compatible app (not from Microsoft) called MobileNoter, but it must be purchased, and a choice has to be made between syncing by cloud or by WiFi. It is not an ideal answer.
- OneNote is not free, as it requires purchase of the 2010 Microsoft Office Suite or OneNote as an individual product.
- Other than via Outlook, there is no "email to OneNote" feature.

Advantages of Evernote:

- Works on most devices and operating systems and syncs across them.
- Works with wide variety of hardware and software, for example scanners, mind mapping software, and graphics editing app Skitch (also an Evernote, Inc. product). The Trunk section of the Evernote website has details on these 3rd party applications.
- Freemium model: Most features available for free, advanced features with subscription (\$45 per year for individuals).
- Export to OneNote available.

Disadvantages of Evernote

- Not as highly organized as OneNote: Three levels of hierarchy as opposed to thousands.
- Cannot "print to Evernote" from other software.

- Cannot add alerts for task management.
- Templates not yet available, but have been promised as a future enhancement.

While there exist a number of note-taking software platforms (see http://en.wikipedia.org/wiki/Comparison_of_notetaking_software), OneNote and Evernote have the most features and by far the most users. Both are excellent products, and we do not recommend one over the other. Instead, we suggest trying both products and then adopting the one that best suits the purposes of the individual or organization.

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